PO CHANGE ORDERS

As long as a purchase order has not been <u>dispatched</u>, any changes can be made to the price, quantity, item description, or distribution of any line in the PO without creating a change order.

Exercise 1: Change the Price of an item.

Steps	Directions	Comments
BEFORE STARTING THE EXERCISE, PLEASE MAKE SURE THAT YOU ARE IN THE TRAINING ENVIRONMENT: https://www.connectnd.us/psp/ndrt/?cmd=login. Use your regular User ID and password.		
1.	**Navigation:** *Purchasing → Purchase Orders → Add/Update POs*	
2.	Click the "Find an Existing Value" tab. Verify **Business Unit (BU)** From the drop-down box for **PO Status,** select **"Dispatched."** Click Search.	*Purchase Orders that have been paid in a voucher cannot have change orders.*
3.	Select a dispatched PO from the search results by clicking on the link.	Record the PO number you are changing here: ________________
4.	**Maintain Purchase Order Page** When creating a change order, all the fields can be changed except for those that are grayed out, such as vendor and buyer.	*If the vendor needs to be changed, close the PO and enter a new PO to the correct vendor.*
5.	**<u>There are three different ways to change the price on a PO.</u>** • The first way is to just change the price amount if the field is available and not grayed out. • Click SAVE. • A screen will appear informing you that this action will create a change order. Click Yes.	
6.	Notice that the Total Amount has changed, and you should see "**Change Order: 1**" below the PO ID at the top of the screen.	
7.	**Budget Check PO** Now your PO needs to be budget checked to see if the accounting information is accurate and to encumber these funds against your agency's budget. Click the icon next to **Budget Status** in the upper right corner of your screen. If you see the word "Processing" in red flash at the top of the screen, that means the system is still busy budget checking. Do not do anything to the PO while that message appears. When the **Budget Status** says "Valid", your PO is budget checked and ready to be approved.	*If you receive an error message or if the budget status remains 'Not Checked,' notify your agency's PO Administrator.*
8.	**<u>Approve Amounts</u>** **Navigation:** *Purchasing → Purchase Orders → Approve Amounts* You may be taken to the correct screen automatically if you go to this navigation straight from the PO main page. If your PO does not show up on the **Purchase Order Amount Approval** screen, follow these steps:	*You can only approve one PO at a time.*

Steps	Directions	Comments
	• 'Find an Existing Value' – • Make sure your business unit and SetID fills in correctly. • Enter your PO number you recorded in step 3.	
9.	Verify that the word "Approve" shows up in the **Approval Action** box. Click Save. The **Approval Status** should change from "Initial" to "Complete."	**Note:** For training purposes, your security should be set up to approval all your own purchase orders and requisitions in one step. In the live PeopleSoft system, some buyers may have to do the initial approval only and put the PO into workflow or a final approver. That is covered in the Approvers training exercises.
10.	If you want to see how the purchase order will look after the change order, click on the yellow button View Printable PO .	
11.	You will be taken to the Process Monitor. Look for the Process Name "POPO005". Click the Refresh button every 30-60 seconds until the '**Run Status**' says "Success" and the '**Distribution Status'** says "Posted."	
12.	Click on the **Details** hyperlink. Then click **View Log/Trace**. In the middle of the next screen under File List, Name look for a PDF file beginning with "POPO0005." Click on that link. This is how your purchase order will look when it is "dispatched," or printed. Note that the price is in bold and the words "CHANGE ORDER" appear at the top of the screen. The PO price that you changed should show up in bold font. This helps the vendor if you need to send a revised copy.	*This preview of the PO is a new feature with PeopleSoft 9.0. It is meant to be a preview only and so the signature will always show as "Unapproved." This is a safety measure so that this view cannot be sent to the vendor without further approval and/or dispatching.*
13.	**Second Way to Change the Price on a PO.**	
14.	Click the "Find an Existing Value" tab. Verify **Business Unit (BU)** From the drop-down box for **PO Status,** select **"Dispatched."** Click Search.	
15.	Select a dispatched PO from the search results by clicking on the link. If the PO has been vouchered, a change order cannot be made.	**Before continuing, see the checklist on customizing your PO screens at** http://www.nd.gov/spo/connectnd/docs/customization-po.pdf.
16.	**Maintain Purchase Order Page** Click the Schedule icon on the far right of the line you want to change the price on.	
17.	**Schedule Page** Click the Value Adjustment icon on the schedule line you wish to change.	

Steps	Directions	Comments
18.	The **Price Adjustments for Schedule #** page will appear. Change the price in the **Adjustment Amount** field. Click "**OK.**" You will be asked whether you want to continue creating a change order. Select **YES**.	
19.	Click **Return to Main Page** link. Click SAVE.	Record the PO number here: _________
20.	Notice that the Total Amount has changed, and you should see "**Change Order: 1**" below the PO ID at the top of the screen.	
21.	Budget check and approve the PO again as before.	
22.	**Third Way to Change the Price on a PO.**	
23.	Find another dispatched PO to change. The last way to change the price is by clicking the icon on the in one of several places in the PO. You will find this icon: • Next to the PO Status of "Dispatched"; • If you customized your PO screens as suggested, the icon should appear on each line item to the far right; • If you have not customized your screens, the icon can be found on the 'Statuses' tab on either the Line or Schedule that needs changing; • By clicking the Line Details or Schedule Details icon and clicking the icon there.	
24.	Once one of these icons is selected, you are able to change the price (as well as quantity, description, etc.) Click Refresh.	
25.	SAVE the PO. Notice that the Total Amount has changed, and you should see "**Change Order: 1**" below the PO ID at the top of the screen.	Record the PO number here: _________
26.	Budget check and approve the PO again as before.	
27.	Printing the Purchase Order **Please complete training exercises 1 and 2 on Dispatching to print your purchase order**.	*POs often have to be dispatched to the vendor again after a change order has been made so that both parties agree to the change(s).*
28.	Express POs Changing the price on a PO is actually easier in Regular POs rather than in Express POs. • To change the price, first click **Expand All.** • Next click the **Schedule** Details icon for the schedule that needs changing. • When in the **Details for Schedule** page, click the icon, then "OK." • Now all fields for that schedule are available for changes. • Make your correction, Save, Budget Check, Approve, and Dispatch as usual.	

Exercise 2: Change the Quantity of an Item.

Steps	Directions	Comments
1.	**Navigation:** *Purchasing → Purchase Orders → Add/Update POs*	
2.	Click the “Find an Existing Value” tab. Verify **Business Unit (BU)** From the drop-down box for **PO Status,** select **“Dispatched.”** Click Search.	
3.	Select a dispatched PO from the search results by clicking on the link. You may use one of the POs you set up in other training exercises.	Record the PO number here: ___________
4.	**Maintain Purchase Order Page** When creating a change order, all the fields can be changed except for those that are grayed out, such as vendor and buyer.	*Purchase Orders that have been paid in a voucher cannot have change orders.*
5.	There are two ways to change the quantity. The easiest way is to simple change the value in the quantity field that needs correction. The quantity box should be available. • Enter a new quantity • Click **SAVE**. You will be asked to verify whether or not to continue with the change order. Click “**Yes**.” • The Change Order number field appears next to the PO number as **Change Order: 1**. • The PO Status changes from “Dispatched” to “**Pend Appr**.” • You will have to budget check, approve, and dispatch the PO again.	*Use these same procedures for changing the quantity in an Express PO.*
6.	The second method is to click on the change order icon Δ. If you customized your screens, this should show up on each line to the far right. This will open up more fields for changes. Continue following the same procedures as in Step 5. It doesn’t matter which ones of these methods you use – they work the same.	
7.	Express POs. Use the same exact procedures for changing quantities in an Express PO as the above.	
8.	Budget check and approve the PO again as before.	
9.	Printing the Purchase Order **Please complete training exercises 1 and 2 on Dispatching to print your purchase order**.	**NOTE**: Please make sure that the POs you worked on in Exercises 1 and 2 are dispatched. We will use them again in Exercises 4-6.

Exercise 3: Change the Item Description.

Steps	Directions	Comments
1.	**Navigation:** *Purchasing → Purchase Orders → Add/Update POs*	
2.	Click the "Find an Existing Value" tab. Verify **Business Unit (BU)** From the drop-down box for **PO Status,** select **"Dispatched."** Click Search .	
3.	Select a dispatched PO from the search results by clicking on the link. You may use one of the POs you set up in other training exercises.	Record the PO number here: ____________
4.	**Maintain Purchase Order Page** When creating a change order, all the fields can be changed except for those that are grayed out, such as vendor and buyer.	*Purchase Orders that have been paid in a voucher cannot have change orders.*
5.	<u>To change the item description</u>: If you customized your screens, the change order icon Δ should show up on each line to the far right. • Click this icon on the line you wish to change. This will make the Description field available for changes. • Enter "**Change Order**." • Click SAVE. • **Change Order: 1** will appear below the PO ID on the main page. • <u>For item description changes only, you do not have to budget check or approve the PO again.</u> • You need only dispatch again if the vendor wishes.	*If you make any other changes to the PO , such as price or quantity, then you WILL have to budget check and approve the PO.*
6.	<u>Express POs</u> Although the description field does not gray out on a dispatched Express PO, you still cannot change the description without clicking on one of the change order icons Δ found in the PO header or any of the Line or Schedule Details pages. Follow the same procedures as for regular POs.	

Exercise 4: Create a Change Order by Adding PO Lines.

Steps	Directions	Comments
1.	**Navigation:** *Purchasing → Purchase Orders → Add/Update POs*	
2.	Click the “Find an Existing Value” tab. Verify **Business Unit (BU)** Enter the PO number from Exercise 1, Step 25, above. Click Search.	**NOTE:** This exercise will assume that all changes will be made in regular POs rather than Express POs. When making changes in Express POs, the procedures are only slightly different.
3.	**Maintain Purchase Order Page** When creating a change order, all the fields can be changed except for those that are grayed out, such as vendor and buyer.	
4.	**To add a line item, click the + sign after the last line.** You will be prompted to enter how many additional rows need to be added. Make sure it says “1” then **click “OK.”** A message box will pop up stating “This action will create a change order . . . This PO has been dispatched, add/delete/change a line or schedule will create a change order.” **Click OK.**	
5.	Enter a description, PO Qty, UOM, Category, and Price. Click Refresh. Check the Schedule and the Distribution lines for this new Item.	*Be sure to watch for account number **888887** in the distribution, and for **Receiving is Required** on the line. Both need to be changed.*
6.	If everything looks good, click **SAVE**. Click the **Return to Main Page** link. Notice that the Total Amount has changed, and you should see “**Change Order: 2**” below the PO ID at the top of the screen.	
7.	**To add a new Schedule,** click the Schedule icon on the far right of the line you want to add onto. • Click the + sign after the last Schedule line. • Continue the same instructions as in step 4.	
8.	Verify the Due Date, Ship To, and Price fields for changes. Enter a **quantity of 2** and increase the Price by $**5.00**. click Refresh.	
9.	You will receive a warning message that the scheduled quantities do not equal the line quantity. • Click “**Yes”** for the system to reset the Line quantity.	
10.	You may receive a message to allocate the changed quantity based upon the split distribution. For this exercise, select “**Yes.**”	
11.	Click the Distribution icon on the new Schedule line.	

Steps	Directions	Comments
	Verify the accounting information and make any changes as necessary. Be sure to check the account number – it may have gone to **888887**. Click "OK."	
12.	You will be returned to the **Schedules** Page. Click the **Return to Main Page** link.	
13.	• Save • Budget Check • Approve • Dispatch	Record the PO number you are changing here: ________________
14.	As with any of these change orders, the changes made will appear in bold font when the PO is dispatched afterward.	

Deleting Line Items or Schedules Lines.

Steps	Directions	Comments
1.	You cannot delete a Line or Schedule once a purchase order has been dispatched. You must cancel the line or Schedule instead. Keep in mind that every PO must have one active line, one active schedule, and one active distribution.	
2.	For information on canceling lines or schedules, see the training exercises on "Canceling Within Purchase Orders."	

Exercise 5: Change the Distribution of a Dispatched PO.

Changes to distribution lines can happen if the accounting information was wrong, the amounts were split incorrectly, or because of price/quantity changes affecting the distribution.

<table>
<tr><th>Steps</th><th>Directions</th><th>Comments</th></tr>
<tr><td>1.</td><td>Navigation: Purchasing → Purchase Orders → Add/Update Express POs</td><td>NOTE: We are using Express POs for this exercise because it is easier to see all the distribution lines at one time.</td></tr>
<tr><td>2.</td><td>Click the “Find an Existing Value” tab.
Verify Business Unit (BU)
<u>Enter the PO number from Exercise 2, Step 3, above.</u>
Click Search.</td><td></td></tr>
<tr><td>3.</td><td>Express Purchase Order Page
Click <u>Expand All</u> to show all distribution lines.</td><td></td></tr>
<tr><td>4.</td><td>Find a line that you wish to change the accounting information.
Change the account number to 603020
Change the Department number
Click SAVE.</td><td>Using Express PO for simple changes to chartfield values is a lot easier than Regular PO.</td></tr>
<tr><td>5.</td><td>If those are the only changes the PO needs, all you have to do is Budget Check the PO.
For this exercise, keep this PO open for the next step. Click <u>Expand All</u> again.</td><td>You do not have to put the PO go through the approval or dispatching process again, since the distribution lines are for internal accounting use only.</td></tr>
<tr><td>6.</td><td>Add another distribution line by clicking the + sign on the far right side of the page of any existing distribution. (Use the scroll bar on the bottom.)
A Script Prompt box will appear asking how many rows you wish to add. Enter “1” and click OK.</td><td></td></tr>
<tr><td>7.</td><td>**Make sure that the PO Qty on the Line item is 2 or more.**</td><td></td></tr>
<tr><td>8.</td><td>Note the Distribute by drop down box on the Schedule line, above the Distributions.
If the word “Amount” is filled in, the values under the Percent and PO Qty boxes should show something like this:<table><tr><th>Percent</th><th>Amount</th></tr><tr><td>50.00</td><td>500.00</td></tr><tr><td>50.00</td><td>500.00</td></tr></table></td><td>You may find this type of change easier to do in Regular PO because that screen will automatically split the quantity or amount after adding a line. Using Express PO, you must adjust it yourself.</td></tr>
<tr><td>9.</td><td>If you change the Distribute by field to “Quantity”, your screen should look similar to this:<table><tr><th>Percent</th><th>PO Qty</th></tr><tr><td>50.00</td><td>1.0000</td></tr><tr><td>50.00</td><td>1.0000</td></tr></table>Depending upon the distribution method you selected, make sure that your amount split evenly on this distribution line.
Make any changes in the Percent, PO Qty, or Amount fields to do so.</td><td>Either distribution method works fine. It is the buyer’s decision as to which way to split the distribution if better for their agency or that PO.</td></tr>
</table>

Steps	Directions	Comments
10.	Finish entering the chartfield values. Enter a different **account** number and **Location** from Line 1 by using the magnifying glass. You may also add a project to this line if your agency uses them.	
11.	Click Save, then Budget Check the PO. This PO is ready for further processing. If a change order was created, you will have to approve and dispatch the PO again. If the status stays "Dispatched," a change order was not created.	Record the PO number you are changing here: ________________
12.	**To Cancel a Distribution Line** If you wish to cancel an entire distribution, please see the training exercise titled "Canceling Within Purchase Orders," Exercise 4.	
13.	For future reference, see the checklist "Making Changes to a Purchase Order" at http://www.nd.gov/spo/connectnd/docs/change-order.pdf.	*Page 3 of that checklist talks about how change orders are affected by receiving.*

Exercise 6: Reviewing Change Orders.

In the previous exercises, you were told to record the PO numbers you made changes to. That was so we can review those changes in this exercise.

Steps	Directions	Comments
1.	**Navigation:** *Purchasing → Purchase Orders → Manage Change Orders → Review Change Orders*	
2.	On the "Find an Existing Value" page, enter the PO number you used in Exercise 4. Click Search.	
3.	A screen will appear with three tabs: • Header Changes • Line Changes • Ship Changes	
4.	The **Header Changes** tab should be blank. This will only show major changes made in the PO header.	
5.	The **Line Changes** tab should show the additional line entered in Exercise 4.	
6.	For each of the POs that received changes in price in Exercise 1, the **Ship Changes** tab should show the lines that were changed. • The original price will show as "**Sequence 0**" next to the Description column. • The new price will show up for each line as "**Sequence 1.**" • The user ID of the person modifying the PO will show, as well as the date and time of change order. Anything with a "**2**" under the Batch column would have come from Exercise 4. • The additional line item should show up. • The additional schedule should appear on the line you chose.	
7.	Click Return to Search. Search for or enter the PO number that you used in Exercise 5.	
8.	Again, the **Header Changes** tab should be empty, as will be the **Line Changes**.	
9.	Under Ship Changes, the lines that had price adjustments on will show up with a **Sequence 1**. Any changes to the distribution chartfields or the additional distribution line will not show up as a change order.	*If more than one user makes changes to a purchase order, this inquiry page can help track which user made which changes and when.*